How to Use Ad Hoc Reports
Introduction: Lesson 1

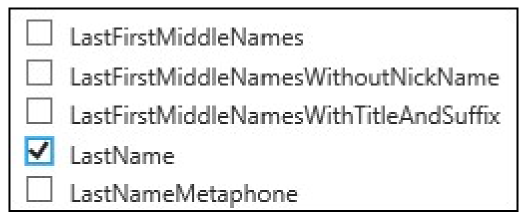
<u>You will need to use I.E. for all Ad Hoc Reports</u>

Exploring the Tool Set

Select an Entity

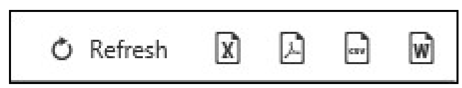
1. From the **Opening Financials' screen** hover over Utilities and choose Ad Hoc Reports
2. From the **Query Builder** page, click once in the entity list
3. Start typing **COREP** – notice CorePerson is at top of screen.
4. Double click on **CorePerson** or click and drag it into the Design area

Select a Data Field

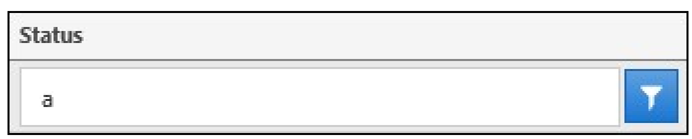


1. Review the list of fields available
2. Locate and place a checkmark beside LastName

Display and Manage Results

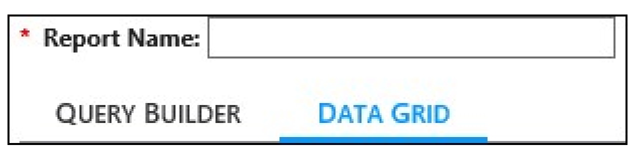


1. Click once on **Data Grid** at the top of the screen.
2. Click the **Refresh** link located on the right side of the screen. This will run the query and display the results.



3. Type one letter in the blank **Filter** box. For this demonstration we will use the letter A, for active
4. Tap the tab key to activate the **Filter**
5. From the pulldown list choose **EqualTo**

Using Results



1. To save your report enter a title in the **Report Name** field.
2. You can also enter a **description** as an additional option
3. Click the Save icon.

    a. Just a quick tip – if you are working on a more complex report, it is a good idea to save your results after each change you make.

4. To clear selections, click the New link
5. To retrieve a saved report, click the Open link
6. To export your results click any of the 4 export options. Excel, PDF, CSV (my favorite), or Word